The original idea for EstateWorks back in the early 2000s was to provide settlement and planning facilities to individual consumers.

Of course, the potential complexites of the estate field soon became apparent!

The focus shifted to supporting professionals and the EstateWorks platform has been used by law firms and financial institutions since 2005.

Over the next few years, the original creators found their focus shifting away from trust and estate workflow, resulting in sale of the EstateWorks platform to Paul Edwards and EstateWorks Systems in 2012.

Paul has a background managing a variety of software companies, but the interest in EstateWorks was stimulated by personal experience when his own estate planning attorneys dropped several balls relating to his affairs. Subsequent research brought to light the operational challenges behind the client-facing specialty expertise and polish.

Since 2012, we have continued to develop and maintain EstateWorks as the preeminent workflow platform for trust and estate orgainzations.

Our team members based in MA and FL apply their years of experience in legal technology, management and training to address the challenges of running efficient Trust and Estates organizations.